

**RETIREMENT ADMINISTRATIVE ASSISTANT**

**DEFINITION:**

Under general supervision, to perform a wide variety of administrative duties within the San Diego County Employees Retirement Association (SDCERA); to assist with special projects, investment administration, personnel functions, general administration; and to perform related work as required.

**DISTINGUISHING CHARACTERISTICS:**

Incumbent in this classification performs administrative duties of a complex nature to support high-level managers who require full-time assistance. This class is distinguished from the next lower class, Retirement Administrative Secretary, in that the latter is not expected to provide the expertise necessary to identify, evaluate and resolve administrative problems; may supervise other support staff.

This class is distinguished from the next higher class, Retirement Executive Secretary, in that the latter is providing administrative services to the Retirement Chief Executive Officer and is often responsible for assignments which are extremely sensitive.

All employees in this classification series are responsible for handling confidential retirement personnel and/or employment transactions.

**EXAMPLES OF DUTIES:**

Types correspondence, memoranda, reports, records, and documents; prepares statistical graphs, charts and tables; compiles and summarizes data and figures for reports; makes recommendations on administrative policies and implements new procedures; collects, verifies and inputs employee payroll data into system; proofs and edits payroll reports as required; maintains confidential personnel files; maintains record of employees sick leave, holiday, vacation time, etc.; assists employees with questions regarding compensation and benefits; handles time sensitive documents and correspondence with appropriate attention; monitors and maintains contracts and equipment maintenance agreements; verifies monthly investment management fees and approves payment of fees; tracks investment accounts and recommends appropriate action; ensures routine custodial bank and compliance issues i.e., tax filings, stock powers, and relationship documentation are completed accurately and on time; completes investment industry surveys as necessary; coordinates money transfers; interfaces with vendors regarding equipment repair; assists with purchase of equipment and supplies as directed; maintains records, invoices, POs, and requisitions in accurate filing system; renews subscriptions; assists with facilities management duties; answers telephone and routes calls to appropriate parties.

**MINIMUM QUALIFICATIONS:**

**Knowledge of:**

- A wide variety of typing layouts and formats.
- Filing systems, including alphabetical, chronological, numerical subject area, and tickler.
- Record keeping and clerical monitoring process.
- Business English including spelling, punctuation, grammar, capitalization, and word usage.

- Modern office procedures.
- The operation and uses of modern office equipment including, personal computers, copiers, and calculators.
- Organizational structure, rules, policies and procedures of San Diego County Employees Retirement Association.
- Related rules, policies and manuals of the County of San Diego.

**Skills and Abilities to:**

- Use word processing, spreadsheet and other computer application programs and equipment in the production of work.
- Use electronic mail systems.
- Operate a wide variety of modern office equipment.
- Type with speed and accuracy.
- Read, understand, follow and explain policy and procedures.
- Compile and summarize statistical, financial and other data in spreadsheet and tabular formats.
- Compose correspondence and routine reports.
- Proofread and review work for accuracy, correctness and completeness.
- Maintain confidentiality of sensitive information.
- Monitor, prioritize and route mail.
- Communicate effectively in oral and written form.
- Interact effectively with all levels of County staff, representatives from outside agencies, and the public in a diplomatic manner.
- Read, understand, follow and explain to others policy and procedures.
- Make arithmetic calculations.
- Read and comprehend complex documents.

**EDUCATION/EXPERIENCE:**

Education, training, and/or experience which would likely demonstrate the knowledge, skills and abilities stated above. Examples of qualifying education/experience are:

1. Four (4) years of full-time experience performing a wide range of administrative secretarial duties, preferably for a public agency; OR,
2. One (1) year of full-time experience as an Administrative Trainee for the County of San Diego.

**SPECIAL NOTES, LICENSES, OR REQUIREMENTS:**

**Probationary Period:**

Incumbents appointed to permanent positions in this class shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).